# Utah! Travel Barometer

**Research and Planning Newsletter** **Autumn, 2000**

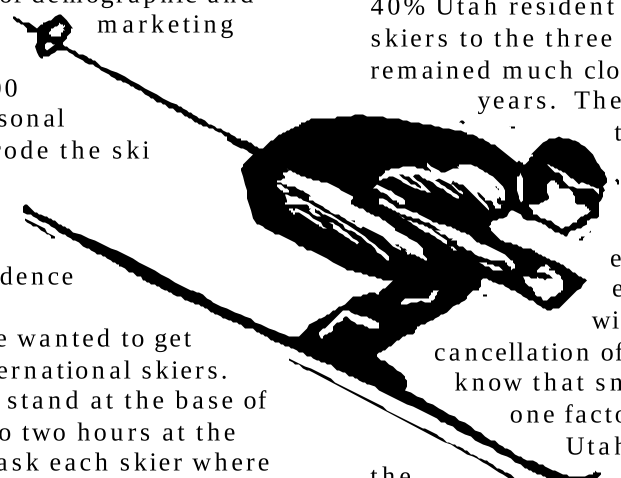
**Division of Travel Development, Utah's Travel Council**

## Highlights of the 1999-2000 Utah Skier Survey

### *An Interview with Susie Becker, Wikstrom Economic & Planning Consultants*

**Q. What Is The Utah Skier Survey?**

**A.** The Utah Skier Survey is a joint venture research project conducted every three years at the 14 ski resorts throughout the state of Utah. The survey is designed to obtain a wide range of demographic and other data that can be used for marketing plans and other business decisions. During the 1999-2000 season, we conducted 1,850 personal interviews with skiers as they rode the ski lifts, well above our target of 1,500. We estimate the survey's margin of error at plus or minus 2.3% at the 95% confidence level.



Specific to this year's survey, we wanted to get more information about our international skiers. So we asked the interviewers to stand at the base of the lift between one and a half to two hours at the beginning of each day and just ask each skier where they were from. When an interviewer hit an international skier, they asked them five or six short questions at the base of the lift rather than ride up the mountain with them. We asked over 44,000 skiers where they were from in this manner, creating an international visitor database of over 900 who completed the short questions.

**Q. Where Do Utah Ski Visitors Come From?**

**A.** We've noticed a trend developing over the last few years regarding the percentage of Utah skiers. The gap between the non-resident destination skiers and the Utah resident skiers has narrowed since 1990, so that now it's pretty close to 50/50. In 1990, destination skiers were at 60% compared to 40% Utah resident skiers. However, destination skiers to the three Park City resorts this year remained much closer to the 60/40 split of previous years. There were some unique aspects of this year's ' survey that may partially account for the less than usual numbers of destination skiers. First, Utah experienced poor snow conditions early in the season and widespread publicity with the cancellation of the World Cup Ski Races. We know that snow conditions are the number one factor in a person's decision to ski in Utah. Secondly, there were fears of the "Millennium Bug." Through the year, we noticed a lower percentage of destination skiers over the Christmas vacation period than we usually see.

Colorado experienced the same phenomenon. There was some make-up during January and February, but not enough to recapture the lost time at the first of the season.

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## Utah Repeats Host Role For NTA Convention

**Utah tourism leaders hosted the annual convention of the National Tour Association (NTA) at its annual meeting at the Salt Palace Convention Center in Salt Lake City, November 10-15, 2000.**

NTA is an organization of North American tourism professionals focused on the development, promotion and increased use of tour operator packaged travel. The association's membership is made up of more than 620 tour operators and 3,200 suppliers and destination marketing organizations.

This is the second time the group has held its annual meeting in Utah. "We were pleased to see NTA come back to Utah," says Carl Little of the Salt Lake Convention and Visitors Bureau, co-chairman of the NTA 2000 Convention Host Committee and a member of the national organization's executive committee. NTA held its convention in Utah in 1989 and delegates spent $4 million in Utah during convention week and new business was booked almost immediately," Little adds. Group tour business in the state increased by 25% following the convention, according to the association. NTA is also planning to return to Salt Lake City again in 2006, the first time the organization has ever had a 'three-peat' in a convention host city. Convention Host Committee members in Utah worked on hospitality efforts to welcome as many as 4,000 NTA delegates to the state. A team of volunteers was organized to greet the delegates at the Salt Lake City International Airport. Opening ceremonies for the NTA Convention were held at the Tabernacle on Temple Square, featuring world-renowned speaker Dr. Maya Angelou and a performance by the Mormon Tabernacle Choir. Trolley Square was the location of an opening celebration. Host Committee members organized sightseeing tours for NTA attendees throughout the greater Salt Lake area. The tours included trips to popular area attractions such as Temple Square, the Kennecott Copper Mine, the Great Salt Lake, Little Cottonwood Canyon, and Olympic venues. One of the sightseeing tours was based on a city street scavenger hunt. In addition, convention visitors had an opportunity to participate in six statewide familiarization tours, which educated them on major icon destinations throughout the state, including southern Utah's Canyonlands area, eastern Utah's Dinosaurland, and the "Top of Utah" in and around the cities of Ogden and Logan.

The demand for group tours is increasing across the country as the population ages and leisure travelers are looking for more convenient and safer ways to travel.

For more information on the convention or on the National Tour Association, contact Carl Little, co-chairman, (801) 534-4910, Keith Griffall, co-chairman, (801) 467-6100 or Tracie Cayford, public information, (801) 538-1377.

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*Q.* **Where are our destination skiers coming from?**

*A.* Most of our destination visitors are from the United States. Utah is heavily dependent on the west (43% of all destination skiers), especially on California (22%). The other regions are fairly balanced. If we look at our top ten states, California is number one, followed by Texas and Nevada. New York is right up there at number four, Florida at number five, Arizona, Illinois, Georgia, Ohio and Massachusetts round out the top ten.

*Q.* **What about the international skiers?**

*A.* Overall, about 3.2% of all skiers are international visitors. If we look at just the Park City resorts, then the number of international skiers goes up over 4%.

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*A.* Over half of Utah's international skiers (53%) are from either the United Kingdom or Western Europe. A third come from the U.K., which is pretty significant. Other high percentages come from Canada (13%) and Germany (12%). Then we drop down to around 3 or 4% for several countries after that. So the U.K., Canada and Germany are the "big three".

*Q.* **What is the economic impact of destination skiers on the state?**

*A.* Destination skiers have a huge impact on Utah's economy. In fact, we calculated that spending by destination skiers reached an estimated $740 million last season and that an additional $436 million was generated from in-direct impacts, for a total impact of over $1 billion. In addition, about 4,500 jobs were created by the ski industry. One of the most surprising results of this year's survey was a significant increase in visitor spending. We expected some increase, but we found that we have a relatively small proportion of our destination skiers who are spending very, large amounts of money. For example, we found that the percentage of skiers who spend over $200 a night for lodging doubled from three years ago, and the percentage of skiers who spend over $400 a night for lodging quadrupled. The extreme spending of this very small group had a large economic impact for the state. In a sense, though, I think we underestimate the true economic impact of skiing on Utah's economy because we don't include Utah residents in our economic impact estimates. The assumption is made that Utah skiers, if they weren't skiing, would take that entertainment money and spend it on another entertainment activity in Utah such as, going out to dinner or going to the movies. However, many Utah skiers would choose to go to Colorado or elsewhere to ski if it were not available in Utah. We can't measure how many would do that, but in a sense we keep dollars at home by providing skiing for Utah residents.

*Q.* **How much does the "typical" Utah destination skier spend per day?**

*A.* Adjusting somewhat for the small percentage of very wealthy visitors, the average skier spends about $273 per day, including lift passes, lodging, car rental, food, gifts and entertainment. That's up from $226 per day three years ago. When we account for inflation, per-day spending has increased about 13%.

*Q.* **What impact has the 2002 Winter Olympics had on Utah ski visitors and what impacts should we expect in the future?**

*A.* During the interviews, several people mentioned they wanted to ski in Utah because it was an Olympic site and has world-class prestige now. In terms of the Olympic year, if we did the survey during 2002, I'm afraid our number of destination skiers could be way down. In fact, 44% of our destination skiers say they are less likely to ski here in 2002. Of this 44%, three-fourths of them say it's because they expect it to be crowded. They made comments to the interviewers such as "There'll be a big party there", "They'll just be getting ready for the party", "They'll be cleaning up for the party", and "It will be crowded". A few mentioned higher prices, but the single biggest reason for less interest in 2002 was crowds. About 20% said they are more likely to come during the year before the Olympics, and a few more, about 28%, said they were more likely to come the year after the Olympics. But most people said the Olympics would have no impact on their ski decision either before or after 2002.

*Q.* **How do the destination skiers perceive the Utah resorts relative to other places they've skied?**

*A.* Utah resorts get really high marks. On a scale of 1 to 5, 92% give either a 4 or 5 rating in almost every category. When we break out by category, Utah resorts receive very high marks in resort size and amount of terrain, accessibility, customer service and snow conditions. All of our average scores were above the midpoint of but we were right around 3 in promotions/packages, ability to get a drink and family entertainment.

*Q.* **Could you discuss some of the differences between the Utah resident skier and the US destination skier and the international destination skier?**

*A.* One area that is similar for all groups is that about three-fourths of skiers and snowboarders are male. But after that Utah is pretty unique. Utah

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residents are more apt to snowboard and much more apt to rank themselves as expert skiers. Not surprisingly, Utah resident skiers are much

## Utah Skier Profile Comparison

| Category | Utah Resident | U.S. (Other than Utah) | International |
|---|---|---|---|
| **Gender** | | | |
| Male | 72% | 72% | 69% |
| Female | 28% | 28% | 31% |
| **Race** | | | |
| White | 96% | 94% | 89% |
| Other | 4% | 6% | 11% |
| **Skier Type** | | | |
| Downhill | 67% | 82% | 94% |
| Snowboard | 28% | 16% | 6% |
| Other | 5% | 2% | 0% |
| **Ski Level** | | | |
| Beginner | 7% | 11% | 14% |
| Intermediate | 44% | 59% | 60% |
| Expert | 49% | 30% | 26% |
| **Median Age** | 33 | 38 | 33 |
| **Median Income Range** | $25K-$50K | $100K-$125K | $50K-$75K |
| **Avg. Stay in Utah (nights)** | na | 4.3 | 7.4 |

younger. The median age for Utah resident skiers is 33. The destination skiers' median age is 38. But the international skiers' median age is also 33. I don't think it's surprising that Utah's skier median age is younger because the median age for the state is so much younger. The median income of Utah resident skiers is far lower than what we see from our destination skiers. The Utah resident skier was typically in the lower income ranges. International destination skiers were most likely to be in the middle income brackets while the US destination skiers were usually in the upper income ranges.

### Partners for the Utah Skier Survey

- ***Ski Utah***
- ***Utah Travel Council***
- ***Park City Chamber and Convention Bureau***
- ***Salt Lake Convention & Visitors Bureau***
- ***Salt Lake Airport Authority***

*Q.* **What things are important to destination skiers as they choose where to ski and how are they making those vacation plans?**

*A.* One of the most exciting results of this year's survey is the increased use of the Internet. Two thirds of respondents indicate that they use the Internet to get information about their winter ski vacation (it barely registered three years ago). And that's great news because in the past when we've asked visitors what information sources they used, it has always been word of mouth and friends and family – things we can do nothing about. We also asked them about what factors were important in making their decision and they'll say snow conditions and friends and family and previous Utah ski experience. So the Internet is something very tangible that we can get our hands on.

*Q.* **How are people using the Internet to help them make their destination decisions and vacation plans?**

*A.* Looking at snow conditions was the number one use of the Internet. Many would also like to make travel arrangements with the Internet, but in many cases online lodging reservations aren't available. From the comments interviewers received, they'd love to have a one-stop shopping place on the Internet where they could get their lodging, lift ticket, airline ticket – everything – all in one place.

*Q.* **Is there anything else from the survey results that you think would be important for people to know?**

*A.* The overall the results aren't too surprising, and are pretty consistent with what we learned three years ago. Three things did stand out to me however: 1) we need to pay more attention to our Utah skiers. They are an important part of our ski economy; 2) the use of the Internet; it is a major tool that people are using and we should be right on top of that technology because they will use it to compare us to other places; and 3) the economic impact from the very small group of wealthy skiers is so significant and we certainly need to do all we can to cater to that market because the benefits to our state are substantial.

## Utah Winter Vacation Motivations

**By Jon Kemp, Research Coordinator**

The Utah Travel Council and Ski Utah conducted qualitative research in May and June 2000 to better define the factors that influence potential visitors' decisions in selecting a winter ski and/or snowboarding vacation destination and to explore and assess attitudes, perceptions and emotional motivations of potential visitors regarding winter ski and/or snowboarding vacations in Utah versus competitive ski states and resorts.
Interviews were conducted among 50 respondents (25 in each market) in two specific markets: Orange County, California and New York City, New York. Respondents were recruited based on demographic characteristics that would provide the most balanced perspective and were asked to complete a series of exercises that would combine to provide several "layers" of analysis regarding winter vacation choices.

The primary motivations of the winter vacation visitor were found to be consistent with the general motivations of all visitors that were identified through previous qualitative research originally conducted in 1996 and confirmed recently in 1999. The primary motivators were discovered to be: escape – the desire to break their daily routine and experience new and different things; reconnection/rejuvenation – the need to affirm personal relationships with family and friends and renew their coping skills needed to return to their everyday life; and discovery – the ability to challenge themselves by participating in an activity that demands focus, concentration and skill resulting in a personal accomplishment that allows them to discover a new dimension to their sense of self. The base level motivations were the same regardless of visitor origin. However, the attitudes of west coast vs. east coast presented some interesting differences.

Respondents living in Southern California indicated that most of their ski trips were "weekend getaways" to resorts relatively close to home. Time (or lack thereof). However, the attitudes of west coast vs. east coast presented some interesting differences. and accessibility appear to drive the ski vacation decision-making process in the West. They are willing to sacrifice the quality of the experience for the perceived convenience of a location close to home. In contrast to the California respondents, respondents in New York indicated that they placed higher priority on the quality of the experience. They will spend more time at resorts that will afford them a higher quality ski experience.

Utah's greatest challenge in attracting visitors to the state remains one of education. Respondents in both New York and California perceive Utah to be a beautiful state strongly associated with the LDS Church. In other words, as one respondent put it, "Utah is Mountains & Mormons". With the exception of Utah's association with the LDS Church, most Western states are perceived to be essentially identical, with little differentiable qualities that draw visitation to one location over another.

Perhaps the most compelling result of the research process was the discovery of the perceived duality of the Utah skiing experience. Respondents indicated that skiing in Utah provided two seemingly contradictory benefits at the same time. On one hand, skiers in Utah are able to attain a state of personal peace as they immerse themselves in the beauty and tranquility of nature. Simultaneously, they experience the heart-pounding thrill of speed and the fear of pushing personal boundaries as they conquer fear and accept the challenge of the mountain dimension to their sense of self. The base level motivations were the same regardless of visitor origin.

### More Skier Research

- **The Utah Skier Database**: published and managed by the Governor's Office of Planning and Budget. New update will be available soon – www.gvnfo.state.ut.us/dea.
- **The Utah Skier Visit Analysis**: published study conducted by the Governor's Office of Planning and Budget on behalf of the U.S. Forest Service in May 1998 – www.gvnfo.state.ut.us/dea.

**Utah!** *Travel Barometer*

Research and Planning Newsletter
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| *2000 2nd Quarter and Mid-Year Visitor Statistics* | | | | | | |
|---|---|---|---|---|---|---|
| Segments | April | May | June | YTD 2000 | YTD 1999 | % Change |
| S.L. Int'l Airport Passengers | 1,574,946 | 1,615,098 | 1,831,027 | 9,847,933 | 9,895,351 | -0.5% |
| National Park Recreation Visits | 490,488 | 607,247 | 729,012 | 2,333,300 | 2,295,148 | 1.7% |
| Nat'l. Monuments/Recreation Areas | 233,012 | 396,959 | 689,505 | 1,595,054 | 1,554,377 | 2.6% |
| Utah State Parks | 498,137 | 719,942 | 917,842 | 2,924,583 | 2,914,359 | 0.4% |
| Visitor Information Centers | 48,430 | 65,561 | 106,839 | 302,148 | 294,654 | 2.5% |
| Hotel/Motel Occupancy Rates | 58.4% | 56.8% | 67.8% | 61.5% | 63.0% | -1.5 points |